

# VIDEO AGE

i n t e r n a t i o n a l

In This Issue:

Prix Italia

L.A. Screenings

Korean TV Market

Murdochs Wanted

www.videoage.org

## India's Tata Elxsi Trades Bollywood For Hollywood

BY DOM SERAFINI

**W**ithin the emerging economically powerful BRIC nations (Brazil, Russia, India and China) there is a company that is as solid and versatile as a brick: Tata, a Mumbai (Bombay), India-based conglomerate with a 2010 revenue of \$67.4 billion that operates companies in 80 countries. The Group, also called Tata Sons Ltd, came to the attention of Hollywood last May when one of its divisions, Tata Elxsi, opened offices in Santa Monica, California to enter the lucrative animation and visual effects markets.

Recently, Tata Elxsi acquired a 51 percent stake in Andy Heyward's A Squared Entertainment, the planned producer of the recently cancelled Arnold Schwarzenegger's *The Governor*. Previously, Indian companies such as Prime Focus and Reliance had expanded into Hollywood with the

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Subramanian Ramadorai

## Videotape Shortage Slows Down World Production & Distribution

Tape to file transition hastened for fully automated tapeless deliveries

**R**ecently, the greatest surprise on record to production, post-production and international distribution execs came with the realization that high definition (HD) videotapes used worldwide came from just one single Sony manufacturing location: Sendai, Japan, a city of one million people devastated by the tsunami that followed the March 11 earthquake.

Other companies with tape factories were affected by the earthquake, including Fuji, Maxell (which makes tape interchangeable with some of the affected Sony formats), and tape duplicator Microboards

Technology, but in television and film, the standard has been the Sony HD tape. The Sony factory that has the monopoly on production of the particular professional HDSR tape crucial to the

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## Exploitation is a 360 Degree TV Business

**B**rand extension, which first manifested itself through merchandising in the '50s and '60s, is hardly a new idea today. But it is starting to adopt a new and much more significant role in the media business; one that could change the face of the content business beyond recognition.

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## Are There Too Many DISCOP Markets?

BY BOB JENKINS

**T**he regionally focused DISCOP markets are mushrooming, but is there a concern that there are too many of such events? This is a topic for *VideoAge* to investigate.

Started 20 years ago in Budapest, the original DISCOP in the Hungarian capital was joined in 2009 by DISCOP Africa, serving the markets of Sub-Saharan Africa, and, in March this year, by DISCOP Istanbul, serving the markets of The Greater Middle East. If all this wasn't enough, DISCOP Africa multiplied with one in Ghana in February and another in Nairobi in September.

The first thing to appreciate about this growth of the DISCOP brand is that not all companies attend all of its markets, and, of those that do, not all the DISCOP markets are attended by the same executives. So, for many companies and individuals, there has been no DISCOP expansion at all.

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**Exploitation is a 360 degree TV business. Anything less is not show business**

**Enough is enough. Are there too many DISCOP markets?**

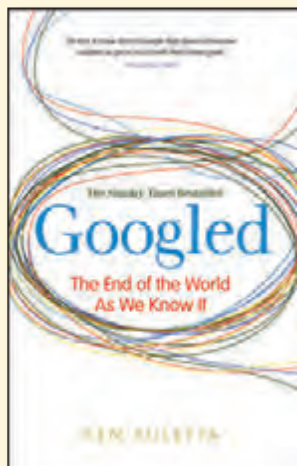


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## Mexico's Triple Play Battleground

**T**hree powerful figures in Mexico are locked in a battle to broaden their grasps on the domestic telecommunications market, which is estimated to be worth the equivalent of \$35 billion a year by 2015. The contenders in this fight are:

Emilio Azcarraga Jean, chairman of media conglomerate Grupo Televisa; Ricardo Salinas Pliego, chairman of TV Azteca and Iusacell (Mexico's number three mobile phone carrier); and Carlos Slim Helu, who controls the majority of the phone service in Mexico.

Now that technology has brought television and telephones closer together, Slim and the two television barons are at odds with each other, especially since Slim is vying to move into television so that he can offer his phone and Internet

customers TV service along with their phone and Internet plans.

Slim's fortune tops an estimated worth of \$74 billion. In addition to telecommunications, his holdings include real estate, retail and mining. His phone company Telmex controls 80 percent of Mexico's fixed telephone lines and his wireless carrier America Movil is the largest in Latin America. In fact, its Mexican Telcel unit makes up 70 percent of Mexico's cell phone service. In addition, Slim's Prodigy Infinitum is Mexico's largest Internet service provider.

At the same time, Azcarraga and Salinas have their sights set on gaining a larger piece of the cell phone market. The pair has teamed up to challenge the high fees Slim's phone companies charge to complete calls on their networks. According to a report, Mexican regulators estimated that those fees are over 40 percent higher than the average charged in countries with a similar

gross national product. Thus, in an effort to compete with Slim, last month Televisa bought a 50 percent stake in Salinas' Iusacell cell phone carrier.

All three men are dealing low blows, with Azcarraga and Salinas filing claims with Mexican regulators that Slim has a monopoly on phone service with Telmex, and Slim making similar accusations against Azcarraga and Salinas. In January, Televisa filed a formal complaint with the Federal Competition Commission, Mexico's anti-monopoly regulatory agency, maintaining that Slim's Telmex is using a satellite TV service called Dish Mexico to get around its ban on broadcasting. In response, Slim pulled millions of dollars worth of advertising from Azcarraga's Televisa. Not to be left out of the dispute, TV Azteca's Salinas has refused to allow Slim's companies to advertise on his TV network unless Telcel reduces its interconnection fees.

It has been reported that this battle is a reminder that Mexico's economy is dominated by monopolies, although the government did block Slim from entering TV and radio in 1990 when he bought Telmex.

## Masi, RAI's "Worst DG" Leaves Mamma

**S**ince last month "Mamma RAI," as the Italian state broadcaster is affectionately called, has a new director general: Lorenza Lei, the 50-year-old deputy DG, who is the first female DG in RAI history. Above the DG, RAI has the chairman of the board. Lei replaces the 58-year-old Mauro Masi, who, before the RAI appointment in 2009, was chief of staff for Italian Prime Minister Silvio Berlusconi. After he "resigned" at RAI, Berlusconi's government appointed Masi president of CONSAP, the state insurance agency.

The "forced resignation" of Masi was welcomed by RAI board member Giorgio Van Straten, who's quoted as saying, "Today is a glorious day for RAI. The [resignation] of Masi ends a negative management subordinate to politics."

Mauro Roffi, editor of Italy's largest TV trade publication *Millecanali*, described Masi as "the least qualified to run RAI" and the balance of his administration, "disastrous."

The general press was even more harsh, with some reports calling him "the worst DG in RAI's history." Lei's appointment was approved by both Italy's Minister of the Treasury, Giulio Tremonti (RAI is under the Treasury) and Berlusconi.

Lei entered RAI in 1995. Before that she was a marketing consultant. Well accepted by the Vatican, Lei was in charge of the 2000 Jubilee for RAI.

# Swiss Television Programs

## CHRISTIANS IN IRAQ

Documentary - 52'



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## Prix Italia's Historical TV

**T**he 63rd annual Prix Italia kicks off September 18-23 in Turin, Italy. The theme of last year's edition was "Future Preview," and it boasted 500 participants. Sponsored by state-owned Italian public broadcaster RAI, the event aims to showcase

superior television, web and radio content, and brings together representatives from 90 different international companies from 48 countries. Eva Hamilton of Sweden's SVT is the event's president, while RAI's Giovanna Milella is the secretary general.

The theme of this year's Prix Italia is "History On Show," showcasing the best of the past and present.

The Prix Italia rotates venue cities every few years, but has called Turin in the Piedmont Region its home since 2009 as a tribute to the 150-year anniversary of the Unity of Italy that originated in the region. In addition to a competition in which prizes are awarded in a host of categories, the Prix also features previews, screenings, conferences and workshops aimed at professionals in the audiovisual sector. The 2010 festival concluded with a presentation of winning programs that were subsequently broadcast on RAI-1,

the broadcaster's main TV channel.

Each year, the Prix Italia awards a number of trophies for radio, TV and web programming, as well as a roster of special prizes. Last year, a special prize was given by the President of the Italian Republic to recognize a TV program that scrutinizes social issues that affect women, younger generations or the underprivileged. Another special prize was awarded to a program that dealt with economic, social and political realities in emergency situations. This time around, special awards include the Special Prize for Programs that Effect Social Change; the Cup of the President of the Italian Republic, awarded to an outstanding radio program dealing in current events; and The Students Prize. In previous years, awards have been given to Federico Fellini, Werner Herzog, Samuel Beckett, Ingmar Bergman, Harold Pinter and other entertainment greats.

The judging for awards will be conducted by a handful of juries. Panelists represent companies from all over the world, especially Europe, Africa and North America. Different juries will specialize in each of the different categories: documentary, drama and performing arts in both radio and television.

## Belsat TV Gets Help For Belarus

**B**elsat TV, which first broadcast in 2007, is the only independent satellite television channel for Belarus. Because the Belarus media is controlled by the country's president, Alexander G. Lukashenko, Belsat TV is headquartered in Warsaw, Poland.

Recently, Lukashenko has implemented additional crackdowns on the media in response to demonstrations against his government, making reporting even more difficult for journalists in the country.

At Belsat TV, three dozen Poles and Belarusians broadcast into Belarus 17 hours a day in an effort to overcome the restrictions imposed on journalists inside the country. Some 120 freelancers in Belarus relay news stories to those working in Poland via phone or Internet. However, freelancing does not come without risks: many have been fined, detained or even arrested. Plus, Belarusian authorities will not accredit them because they work for Belsat TV.

Founder and director of Belsat TV, Agnieszka Romaszewska-Guzy, is the daughter of two Communist-era Polish dissenters. The Polish government supports the democratic opposition in Belarus, with Poland's Foreign Ministry giving a yearly contribution of the equivalent of U.S.\$6 million to Belsat TV out of Belsat TV's \$9 million yearly budget. In addition, the Swedish government provides approximately \$3 million over a three-year period that will end in 2013.

## BBC Budget Needs More Cuts

**I**t seems the BBC is having more trouble cutting costs than it expected. After British Prime Minister David Cameron's conservative-led coalition government accused the BBC of "extraordinary and outrageous waste," the corporation agreed last fall to freeze a portion of its public funding for six years, imposing a 16 percent budget cut on itself through 2017.

The BBC is currently trying to decide how to cut £1.3 billion (about \$2.1 billion) in spending for a spending plan ending in 2017.

Criticism of the BBC has mainly

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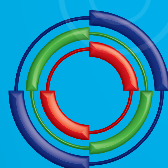
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(Continued from Page 6)

been focused on the license fee, through which the public funds the corporation, and each year £145.50 (about \$240) is collected from every British television-owning home. The license fee generates approximately 80 percent of the BBC's total income, at £3.6 billion a year.

Members of the British Parliament are also critical of the high salaries given to top-level executives at the BBC. For example, director general Mark Thompson received £838,000 (\$1.4

million) in his compensation package in 2010. In keeping with its efforts to reduce its budget, the BBC will reduce that figure to £619,000 this year.

Cuts thus far include the BBC's decision to reduce the World Service's employees by half, axing 650 employees and terminating programming in Russian, Mandarin Chinese and other languages. Additionally, the BBC has frozen some salaries and reduced its payroll for senior management by 18 percent since August 2009.

While it is struggling to reduce spending, there is little doubt that the BBC dominates in the U.K. It operates 10 TV channels and 16 radio stations domestically, and each week, over 97 percent of the British population consumes content produced by the BBC.

## ProSieben Assets Sold

**F**innish media company Sanoma is the leader of two consortiums that purchased Munich-based broadcaster ProSiebenSat.1's Benelux television assets for a combined enterprise value of €1.23 billion (\$1.8 billion).

Sanoma will take a 67 percent stake in the Dutch arm of SBS Broadcasting, while Talpa, the holding company of John de Mol, will take the other 33 percent. In a separate consortium in Belgium, Sanoma, local media group Corelio, former sports journalist Wouter Vandenhaute and TV producer Erik Watte will all take stakes in the company. Sanoma chief executive Harri-Pekka Kaukonen believes the acquisition will

allow for cross-promotion between TV, online and print platforms. It plans to finance the purchase of equity with €859 million in new debt.

ProSieben is controlled by private equity firms Kohlberg Kravis Roberts and Permira. The broadcaster has been trying to sell SBS Broadcasting since the beginning of 2011 in an effort to reduce its debt. SBS has a 27 percent share of the Dutch TV advertising market and a 24 percent share of viewers. In the Dutch-speaking Flanders market, SBS has a 25 percent share in advertising and a 16 percent share of the TV audience.

In 2010, the Dutch and Belgian operations had a revenue of €404 million, and earnings of €110 million before interest and taxes. As a result of the acquisition, the net debt to EBITDA ratio is expected to fall to 1.9 for 2011, down from 3.4 in 2010.

Additional bidders included Hellman & Friedman and the Modern Times Group. Some investors were disappointed that ProSieben chose not to sell its Scandinavian assets.

## Just For Laughs Gags India

**O**ver the last few years, Asia, and India in particular, has become one of the strongest markets for Canadian production and distribution company Just for Laughs (JFL).

In India, JFL has programs airing on several channels at the same time, as *Gags* airs on general entertainment network Zee and kids network Pogo (Turner). Since 2004, Pogo has aired new seasons of *Gags*, while Zee recently acquired 211 episodes of the show. In addition, the company finalized a DVD deal in India, and licensed *Gags* to Air India and Kingfisher Air. JFL is also in the process of negotiating a closed-circuit offer to air *Gags* on trains in Mumbai.

Since *Gags* is a clip show with no dialogue, it is well suited for a country that is home to as many different languages as India is. Thus, JFL may even decide to shoot gags for the show in India in the future. JFL produces series *Just For Laughs Gags* (*Gags*), a non-verbal comedy series that has been sold in 135 countries and to 95 airlines.

This year, JFL is rolling out a new spin-off for kids called *Just Kidding Kids*, and since the majority of India's population is under age 20, licensing the new series in India will be key for JFL at MIPJunior and MIPCOM. ●





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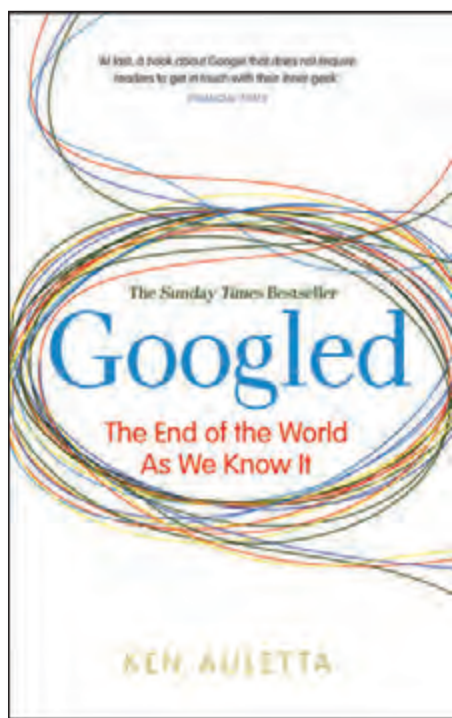


## From TV Foe to TV Friendly: Googling To Heart's Content

**W**ant to know something? Google it. But when *New Yorker* columnist and author Ken Auletta wanted to know about Google, he had to go to the source, interviewing founders Sergey Brin and Larry Page, CEO Eric Schmidt and countless others before writing *Googled: The End of the World As We Know It* for Virgin Books in the U.K. (418 pages, £11.99 [U.S.\$20]). According to Auletta, he sought to “profile a company at the epicenter of the digital revolution.” Although Google was at first reluctant to cooperate, it eventually agreed, and Auletta made weeklong trips to the Googleplex in Mountain View, California, sat down with the founders, interviewed Schmidt 11 times, and conducted approximately 150 interviews in total.

Larry Page and Sergey Brin met as graduate students at Stanford, where they embarked on a project to build an efficient search engine that didn't waste users' valuable time. Google was incorporated in 1998, and the founders and their few employees worked out of a garage they rented from their friends in Menlo Park. But as the company grew, adding more employees, their makeshift desks grew impractical, and they eventually moved to the Mountain View campus.

The author explains that being hired by Google is not an easy feat. A potential employee is required to meet with each of the founders and pass what is known as the “airplane test,” in which Googlers are asked: “How would you feel if you were stuck next to this person [the candidate] on a plane for several hours?” Anyone who fails the test is considered unlikely to work well as part of a team. The hiring process, which champions the idea of a cooperative working community, reflects Google's corporate culture. The founders provide their employees with extraordinary benefits — a daycare center exists on the Google campus, and employees don't have to take time off for doctor visits; they can tend to their health needs by visiting a doctor on campus. They can even bring their cars for oil changes, and Google provides them with bikes and buses to travel throughout the campus and to



and from home. Employees can also relieve stress with professional massages at work, as the founders believe that happy and stress-free employees are freer to exercise their creativity, thereby benefiting the company. Brin and Page's preoccupation with efficiency led them to worry that if Google workers had to leave the Mountain View campus to purchase lunch, they would waste valuable time standing in line waiting for their meals. Thus, the founders justify their lavish cafeteria, with food prepared by Charlie Ayers, a chef who once cooked for The Grateful Dead.

In addition, Googlers have generous stock options, and when employees' Google stock declined in 2008 due to the economic downturn, they were allowed to exchange that stock for new options, demonstrating Brin and Page's dedication to the company and its employees.

The 20 percent time the founders allot to all Google engineers and that is “parceled out selectively by management to nonengineers,” during which employees can devote one day per week, or 20 percent of their time, to a project that interests them, is truly innovative in business. The freedom to pursue individual projects, the extensive Mountain View campus, and VP of Search Products & User Experience Marissa Mayer's open office hours for employees to discuss their special projects

may sound like graduate school life rather than business culture (Stanford's culture was a huge influence), but these privileges promote the creative and open environment vital to Google's success. In fact, many of Google's innovations were born of this 20 percent time: Google News resulted from engineer Krishna Bharat's 20 percent time, and Google Voice can also be attributed to this innovative business practice.

While Google was busy innovating, and as technology continued to move forward, it created a wave that, according to Auletta, has crashed into and even drowned some old media companies. Google's AdWord and AdSense have threatened traditional advertising companies. Newspapers suffer due to Google News, as more and more people abandon their subscriptions to read the news articles Google links to. Book publishers, citing copyright infringements, took on Google's endeavor to digitize every book ever published through Google Books.

Google's acquisition of YouTube prompted many television and film executives to draw their swords against the offending company. The author explains that television companies were not only worried that sites such as YouTube would rob them of viewers, but that they would rob them of content as well, devaluing content by making it available for free online. While NBC couldn't deny that clips of *Saturday Night Live* posted on the Internet increased the show's ratings, many content providers felt threatened, and in late 2006 and early 2007, Viacom chairman Sumner Redstone demanded that YouTube remove 100,000 clips of Viacom's copyrighted content from the website. In 2007 Viacom filed a lawsuit against Google in federal court for “massive intentional copyright infringement.” But there were those, such as Viacom's CBS CEO Les Moonves, who saw YouTube as a platform. CBS partnered with YouTube in 2006, allowing the website to air short-form clips of CBS content, with both companies sharing advertising revenues. These incidents indicate that old media companies must learn to coexist with new media companies that make waves like Google, rather than be drowned by them.

Auletta's book is balanced, exposing both the positives and not-so-positives of Google. He points out that the founders' minds are so focused on algorithms and mathematical equations of efficiency that they sometimes lose sight of what their customers might want, at times resulting in concerns about user privacy. When Gmail was first launched, there was no “Delete” button. This omission caused an uproar, as users were afraid that Google might look through the messages they were unable to delete; however, Page and Brin defended the lack of a “Delete” button. The founders argued that the presence of a “Delete” button would require Gmail users to decide whether they should keep or erase a message, and the time spent making that decision could be used for more productive endeavors. It hadn't even occurred to them that users might complain.

The company's goal is to gather enough information about its users that a Google search will be able to quickly and efficiently generate one answer to a query. Although Google's cookies collect information about users in such a way that allows users to remain anonymous, privacy is a real concern. Besides, do users actually want Google searches to be that exact? Another potential internal threat that Auletta identifies is the possibility that Google may believe “too much in their own virtue and [lose] the humility that is a counterweight to hubris.” He cautions that Google's self-proclaimed mission, “Don't be evil,” could blind the founders and employees to the potential harm some developments could cause. An existing example is Google's rush to digitize every book: while the company's intentions were noble and its goal to provide more complete search results to queries, book publishers saw the copyright infringements as Google doing evil.

Although it is a comprehensive investigation into an important player in the future of media, the book at times provides unnecessary information. Auletta offers a physical description of those whom he interviewed in person, and while these descriptions can be helpful in demonstrating the informal and relaxed nature of those who work at Google compared to executives at stuffier old media companies, the descriptions were only helpful to an extent. While the fact that Page and Brin arrive at important meetings in T-shirts, sporting roller blades or bright red Crocs compared to old media executives' dark suits speaks volumes about their personalities and the company's culture, their eye color and hair texture do not.

Overall, though, the book is a thorough evaluation of the company, supported by interviews and quotes from new and old media executives who are knowledgeable about the subject. The extensive 34 pages of notes at the end of the book are evidence of Auletta's wide-ranging search to gather accurate information. *Googled* is a valuable read for a generation that has been Googled. **SA** ●



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## More Pilots, More Expenditure, More Elders, More Distributors

**T**he big news at this past L.A. Screenings was either the money invested by both the studios and the networks, or the large number of pilots commissioned, which in effect means the same thing.

As an example, Comcast has invested \$200 million in programming development this year for its NBC, and an additional \$100 million for its cable networks. The group has commissioned 23 pilots. This from a company that just two years ago was planning to do away with pilot season.

There are also many subplots to this news report, but let's start with the pilots.

A total of 88 pilots were commissioned by the big broadcast TV networks and an additional 15 by the large cable nets. This represents a 15 percent increase from last year. By doing the math described below, we can see how the new season was a \$240 million proposition even before it began. Of this amount, \$100 million comes from the TV outlets, and \$140 million from the studios.

At the Upfronts, held in New York City prior to the L.A. Screenings, the major broadcast TV networks first cancelled 31 shows, then ordered to series 43 pilots, including those for mid-season and back ups.

Going back to the costs of the pilots, these vary drastically, especially if pilots are produced for broadcast networks or cable channels, so these numbers



Sony Pictures' Steve Mosko, *Oliver Platt* star of SPT's *The Big C*, Keith Le Goy

represent averages. Plus, many variables exist that would change the economic dynamics, like participation back to the network or cable channel, making it a co-production with the network or cable channel and having an 800-pound gorilla show runner/executive producer, etc.

A network prime time one-hour drama pilot costs \$3.5 million of which \$1.5 million comes from the net's license fee. A half-hour network sitcom pilot costs \$1.25 million, minus the \$500,000 net's license fee. Cable is much cheaper, depending on the cable channel, and utilizing special effects, one can probably expect costs to be 40 to 60 percent less in each category.

Considering the 25 drama and 18 comedy series picked up by the broadcast nets, studios are looking at deficits to recoup on the international market in the order of \$1.2 billion for a full season (22 episodes).

Also news is that broadcast networks have pushed for new series with broader age appeal. This is because marketers are now focusing on those 55 and up. Previously, advertisers and therefore TV nets based their strategy on viewers 18-49 and 25-54. The only net that catered to older viewers was CBS with their view that all age groups count. Today 35-64 has become the new target since, according to the U.S. Bureau of

Labor Statistics, people 45-64 have the highest median weekly earnings of any age segment, thus becoming the ideal consumers.

In addition, the median age for the audience for a broadcast network is now reported to be above 45, with FOX at 45.4 (up from 41.5 in 2006), NBC at 50.1 (from 48.5), ABC at 52.3 (from 47.4) and CBS at 56 (from 53).

Another trend that will please international buyers is that studios came to the realization that "in your face" style of product placement in TV shows can generate "cognitive rejection," which in



NBC Universal's Belinda Menendez

normal parlance means that viewers reject intrusive branding, and therefore such placements are no longer in plain view, but more subtle.

The L.A. Screenings were events for both the small and mid-size companies as well.

The mini-majors set a record with seven exhibiting at the Century Plaza Hotel and two in their L.A. offices. Including the telenoveleros and the various indies, a total of 76 companies were actively screening in L.A.: eight more than last year. In terms of product, the telenoveleros introduced an unusually fewer number of new telenovelas, but business was reported to have been done by all indies during the Latin Screenings, which preceded the studios' pow-wow.

The overall number of buyers remained stable at 1,500 with an increase registered only from digital outlets, especially from Netflix, which this time sent 10 buyers, versus three in 2010.

For many of the international buying contingent these Screenings offered quality and quantity rarely seen in recent times. The only criticism was that screening rooms (especially at Warner Bros.) were kept at very cold temperatures in order to keep buyers awake during the



20th Century Fox's Marion Edwards, Mark Kaner



Record TV's Delmar Andrade, Turner's Monica Sufar, Record TV's Edson Mendes, Turner's Enrique Iteredia.



# Rai World

## European Distribution

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Rai 2

Rai 3

Rai News

Rai Scuola

Rai Storia

Raitalia  
Radio

Rai radio1

Rai radio2

Rai radio3

### RAI TV AND RADIO CHANNELS THE ITALIAN LINE-UP FOR EUROPE

Rai World

Chief Marketing, Distribution and Sales Officer : Giovanni Celsi [g.celsi@rai.it](mailto:g.celsi@rai.it)  
Area Manager Europe: Monica Pizzoli [m.pizzoli@rai.it](mailto:m.pizzoli@rai.it)





TV Azteca's Carmen Pizano, Comarex's Marcel Vinay

extra long presentations. In addition to the announced series, studios also kept adding last-minute new shows to their line-up, making the screenings longer

than expected, and, at times, causing late arrivals at other studios' screenings.

It was also noted that some studios went back to the old practice of separating buying groups from the same country and using more screening rooms. The large number of parties also brought back fond memories of an industry getting back on its feet. On the indie side, Venevision opened the Latin Screenings with a big party, while Telefe closed them with another large bash a few days later. Just after Telefilms staged its own 50-year celebration show, the studios began their evening extravaganzas with Disney, followed by Sony and Fox each hosting some 1,000-plus invitees. Others, such as Lionsgate, CBS and NBC Universal went with restricted dinners and cocktails.



CBS Studios' Barry Chamberlain, Armando Nuñez, Joe Lucas

The overall buyers' assessment of the new U.S. TV season is that the nets hope to make women laugh with sitcoms, men tune in with sexy shows and to lure older viewers that are now back in the advertisers' graces, with remakes.

The mix was eclectic: retro shows such as *Pan Am* and *The Playboy Club*; mysteries like *Missing* and *Alcatraz*; political dramas, *Boss* and *Veep* (for cable); law and order, *The 2-2* and *Person of Interest*; remakes like *Charlie's Angels* and *Prime Suspects*; animation and spin-offs, but very few medical shows. The largest selection is definitely the supernatural genre with some 10 new series, including two from Steven Spielberg (*Terra Nova* and *The River*).

In terms of specific preferences, Canadians such as Jay Switzer liked NBC Universal's drama *Smash*, Warner Bros.' *Person of Interest*, and Disney's *Revenge*.

From Latin America, for buyers such as Ecuavisa's Karina Medina, top shows were NBC-Universal's *Grimm* and Warner Bros.' *The Secret Circle*.



Disney's Ben Pyne, Anne Sweeney

From Europe, the Italians did not wish to comment for fear of price increases.

Studio executives were very upbeat and charged up by the new season, but, as summarized by a studio president, "Yes, we're very happy, but we're also very aware that up to 80 percent of the new series will fail." ●



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## Korean TV Trade Show Challenges Asian Markets

BY SARA ALESSI

Competition for prominence in the TV trade show sector is heating up in Asia. After the Singapore-based Asia TV Forum, the China-based Shanghai International Film Festival, the Taipei TV Festival, the itinerant Sportel Asia and the Hong Kong International Film & TV Market, another market in the region is flexing its muscles: The Broadcast Worldwide, or BCWW.

The upcoming BCWW, billed as Asia's largest trade fair in the broadcasting and visual industry, will be held August 31 through September 2, 2011 in Seoul, Korea. Launched in 2001, it's an annual tradeshow on broadcasting content for developers, distributors, buyers, sellers, producers and investors. BCWW is organized by South Korea-based Korea Creative Content Agency (KOCCA), which receives assistance from Jordan-based production and distribution company, Media Marketing and Production Est.

*VideoAge* spoke with organizers of the event, as well as past participants regarding the purpose behind the market and the significance it has for the Asian TV industry.

Last year, for BCWW's 10th anniversary, the market registered 4,515 visitors from 50 countries. Also in attendance were 221 exhibitors and about 1,600 program buyers. Thus far, BCWW has managed to outnumber turnout from the previous year since 2008, as the number of buyers grew from 1,200 in 2008 to 1,400 in 2009 and 1,600 in 2010. The same goes for the number of exhibitors, which climbed from 160 to 207 to 221 in 2008, 2009 and 2010, respectively. If organizers play their cards right, they may be able to increase the number of exhibitors and buyers in attendance at the upcoming market.

Indeed, for 2011, according to Insook Lee, head of Global Business Division at KOCCA, organizers expect to "outnumber the previous year's visitors



A&E Networks' Ling Sze Gan

and buyers." To make the market more prosperous, organizers are particularly eager to increase the number of buyers who attend the event. "In order to do so," Lee explained, "we are preparing diverse programs" that will appeal to all.

Sagr Al-Humoud, general manager of Media Marketing and Production Est., has been working with KOCCA to represent BCWW in the Middle East and Africa, and he noted that his company has been "responsible for attracting and inviting buyers and exhibitors for BCWW 2008, 2009 and 2010. According to Al-Humoud, "BCWW is expanding every year and is attracting more TV industry professionals from all over the world."

In an interview, Al-Humoud stated, "We pride ourselves on our great relationships with many Korean TV firms like KOCCA. With this major Korean agency, we are proud to represent them in the Middle East and Africa to help organize BCWW TV content every year. BCWW is considered the main content market in Asia. It attracts many TV firms, buyers, and exhibitors from Asia, Europe, Africa, America and Australia."

KOCCA's Lee informed *VideoAge* that distributors and broadcasters take up the most exhibition space, though producers do participate in their Global Media Forum conference, which features co-production, collaboration and pitching sessions.

According to one report found on BCWW's website, at BCWW 2010, 80 percent of exhibitors hailed from Northeast Asia, eight percent from Southeast Asia, six percent from Europe, three percent from Mideast Asia and two percent from the U.S. This compares to 67.5 percent of buyers coming from Northeast Asia, 19.3 percent from Southeast Asia, 11.8 percent from Mideast Asia, 0.9 percent from Europe and 0.3 percent from the U.S.

Given the fact that the market takes place in Seoul, it comes as no surprise that Asian buyers have a tendency to attend BCWW in high numbers. However, Lee reported "extensive participation from around the globe, [including countries] such as Belgium, England, Australia, Middle Eastern and African countries," which has "brought a global atmosphere to our show" in the past.

Focusing on Asia, in 2010 BCWW put the spotlight on China, hosting a China Day event highlighted by a cocktail party. China Day provided a "meaningful opportunity to promote Chinese content and build relationships amongst buyers," stated Lee. While there will not be a China Day this year, BCWW 2011 will continue the tradition and "manage a program for visitors to experience and enjoy content from 'another' country," although they have not yet revealed details about the event or the featured country.

In addition, BCWW 2011 is poised



KOCCA's Insook Lee



Sagr Al-Humoud, general manager of Media Marketing and Production Est.

to provide special opportunities for participants to review content in the Contents Experience Room. Lee assured *VideoAge* that the Contents Experience Room will be a great place for individuals to stop by and view content during short breaks between meetings in their busy conference schedules.

For the first time last year, BCWW 2010 featured a 3D Contents Pavilion. Lee elaborated that it included, "special operations by domestic 3D production companies demonstrating their content," and that it, "consisted of state-of-the-art facilities and technologies where trial performances of 3D content were available to participants." BCWW 2011 will feature another Contents Pavilion, representing, in Lee's words, a "hot trend."

Al-Humoud's company has participated in and attended BCWW since 2005. He has found that having "KOCCA as the main host for BCWW is playing a great and effective role in promoting Korean content and culture, and allowing many TV buyers and exhibitors from all over the world to do business."

A survey on BCWW 2010 posted on the BCWW website indicated that participants report the purpose of the market can be broken down accordingly: 59 percent to do business, 21 percent to see trends of the media business, 15 percent to get acquainted with media professionals and five percent for other reasons.

New York-based A&E Networks' Ling Sze Gan, regional director, Content Distribution, Asia Pacific, said from her Singapore office that the company will be attending its second BCWW this year, and A&E Networks has decided to return to BCWW because the market "gives us the chance to meet with Korean broadcasters who do not travel to MIP-TV or MIPCOM." For Gan, BCWW is particularly valuable due to the fact that "meeting with our customers in person and in their territory enables us to better understand their content needs and strategy, and to determine the most effective programming solution for them." ●





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## Videotape Shortage

(Continued from Cover)

television and film industry was shut down after the tsunami, which flooded the manufacturing complex located near the earthquake's epicenter.

According to Sony executives with whom *VideoAge* spoke in New York City, production should resume at the end of July, but there are contrasting reports.

For now the industry is coping with the shortage by "degaussing" used tapes, however this is a practice that can be used three times at the most without significant loss of quality, despite differing opinions.

Meanwhile, while companies that perform tape-evaluation are doing brisk



Maurizio Zuccarini, general manager of Swiss-based World Content Pole SA

In any case, this past June 1, Fox studios switched over to a digital delivery system called FoxFast, which also offers marketing, its catalogue and screening via the Internet. According to Fox's John Koscheka, the studio began its program of eliminating physical media in 2008.

Sony Pictures is also actively pursuing a tape to file transition with its Global Onboarding initiative. Sony's Kerri Wilson stated that since the Onboarding

**VideoAge:** According to some experts, degaussed tapes can be re-used up to 80 times. Is that correct?

**Zuccarini:** Technically yes, but the risks will be higher with every new degauss. In addition, degaussing is time-consuming and is a costly operation. Ultimately, it depends on the level of reliability one requires. My position is to always take as few risks as possible, especially when content is a company's key business.

**VideoAge:** Some re-certification companies use state-of-the-art equipment that cleans and inspects used tapes for physical defects. Will this help?

**Zuccarini:** Yes, of course it will help to manage emergencies like this one, but it isn't a real solution and I cannot imagine that it can become a standard procedure.

**VideoAge:** Even some post-production houses are now advocating sending programs as computer files. Will it work for most TV outlets?

## Bollywood For Hollywood

(Continued from Cover)

acquisition of several post-production services by the former, and investment in Steven Spielberg's Dream Works by the latter. Recently, Germany's RTL Group partnered with Reliance to launch two thematic TV channels in India.

These and other companies are now creating a new outsourcing industry in India to increase the country's entertainment sector, now generating estimated annual revenues of \$13 billion. Of these domestic revenues, \$1 billion comes from the animation and visual effects business, which, according to some estimates, is growing at a rate of 18 percent per year.

Not that Indian companies are new to the business. In the past, western companies that won visual effect contracts subsequently subcontracted the job to Indian labs, where costs are 40 percent lower. Now the strategy is to go direct and take full contracts, but to do so Indian companies need a strong presence in Hollywood.

The Tata Group is said to be the largest private conglomerate in India with interests in communications, information technology (IT) and entertainment, among other areas. Of Tata's 90 operating companies, 27 are publicly listed.

The group was founded 143 years ago by Jamsedji Tata and with its current chairman, Ratan Tata, it is in its fifth generation of family stewardship. The Group became a household name with the 2008 acquisition of Jaguar and Land Rover from Ford Motors.

In 2009 the New York-based Reputation Institute ranked the Tata Group as the 11th most reputable company in the world. Recently, however the group became involved in the 2008 Indian government's allocation of the mobile-phone spectrum, which tarnished Tata's admired reputation, even though nothing in India's auditor general's report suggests that Tata received any special treatment.

In the communications, IT and entertainment businesses, the Tata Group operates with four divisions:

**Tata Consultancy Services (TCS)**, a global U.S.\$8.2 billion a year IT services company headquartered in Mumbai, with offices in 42 countries worldwide and multiple cities in the U.S. It serves more than 11 sectors, including banking. While it does IT work for entertainment companies, TCS does not dabble in entertainment per se. It is run by N. Chandrasekaran and it has been publicly traded in India since 2004.

**Tata Interactive Services**, a producer of educational content and e-learning products for schools, corporations and



And now to the agony of the missing video tape replay

business, a two-hour Sony HD tape that basically looks like a Betamax shell and cost U.S.\$250 before the shortage, now can reach up to \$1,000.

The closing of the Sony videotape factory also affected other sectors since it stopped production of v8 and Hi8 tapes, which are used by the airline industry in particular. An In-Flight Entertainment (IFE) report stated, "There is conflicting information available as to when this key source of supply will be back in business. Even if things resume, it is also unknown if preference will be given to the manufacturing of higher demand products over airline stock." According to the IFE story, supply of v8 and Hi8 tapes could run out as early as this month.

Officially, the U.S. studios tend to minimize the problem, pointing out their newly developed digital delivery system that utilizes Internet protocols, and in this field, Disney, Sony, Fox and Paramount are said to be leading the way in digital delivery initiatives. Others, however, point out that HD cassettes are needed when dubbing is necessary. Studios reply that they control dubbing activities, therefore the problem is non-existent. Others rebut that not all TV outlets can receive digital downloads, therefore the shortage of HD cassettes is a real problem.

program began in 2010, the studio services 268 clients of whom 68 percent are broadcasters.

Similarly, post-production houses are now pushing for ProRes 422 HD video compression format developed by Apple to be used with less expensive disc systems and Sony's XDCAM as a replacement for videotape recorders allowing discs to be used (also supported by JVC). Some experts hope that this incident will force more TV outlets to accept programs as computer files.

As aforementioned, tape evaluation companies are on top of the HD tape shortage problem and are now highlighting state-of-the-art machines to re-certify broadcast videotapes by cleaning and inspecting used tapes for physical defects and damages. In the view of re-certification companies such as the Orange, California-based Edgewise Media, "At this time, [this] is the only viable solution."

To shed some light onto this tape emergency and to seek long-term solutions, *VideoAge* reached out to Maurizio Zuccarini while he was on a trip to Los Angeles. Zuccarini is the general manager of Swiss-based World Content Pole SA, a world content bank, powered by Swiss Telco powerhouse, Swisscom. WCP is described as a digital rights management and delivery content solution.

**Zuccarini:** Yes, if the digital master files directly from post-production houses are stored in a high resolution compression file such as ProRes. When content in such high resolution is stored on a server, it would be easy to edit and/or encode it with different codecs. The idea is to start from the best quality and deliver any format as requested.

**VideoAge:** Finally, what is your suggestion/recommendation?

**Zuccarini:** My opinion is that now it's time to redesign the content workflows, which means not only to store and deliver the digital files directly to TV outlets, but to create for the production company a more profitable, easy-to-use digital platform of services. That's what we do at WCP and we have experience with content flows from post-production and management rights, up until content is delivered. We at WCP are now ready to introduce an advanced platform of integrated digital solutions, which will allow each player to focus on its own core-business. In my view, for production companies to invest time and money to build their own digital delivery systems is not the right choice, because upgrading digital solutions is, for the most part, illogical and a waste of money. It's like companies wanting to start their own banks just to manage their own money. ●



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## Bollywood For Hollywood

(Continued from Page 18)

government. Home office is in Mumbai, with offices in eight additional countries. Sanjay Shama runs the company.

**Tata Communications** (TC), a U.S.\$2.45 billion a year telco that also operates **Tata Sky**, a joint venture between Tata Sons, which owns 80 percent and Rupert Murdoch's Star Group, which owns 20 percent. Reportedly, Singapore-based Temasek Holdings picked up a 10 percent stake in Tata Sky from Tata Sons, diluting Tata's stake in the venture to 70 percent. However, the Group would not confirm it. Tata Sky, a direct-to-home satellite platform, covers more than 4,500 towns in India. Tata did not divulge the number of subscribers. Vikram Kaushik runs it, while Ratan Tata himself runs TC from Mumbai.

**Tata Elxsi Ltd** (TEL), a U.S.\$84 million a year engineering company publicly traded on the Indian stock exchanges. The "Elxsi" part of the company's name came from an acquired company. Under the label "Visual Computing Labs," it operates a division called Mediaworks, which is involved in animation, visual effects and commercials production. TEL maintains its headquarters in Bangalore, India and in seven other countries, with multiple offices in the U.S. including studios in Los Angeles, which were opened last year. Subramanian Ramadorai runs the company.

With Hayward's A Squared Entertainment, Tata Elxsi Ltd will produce and distribute children's series for television, the Web, mobile devices and video games. Under the deal, TEL has agreed to finance the productions and supply the animation workforce from its studio in Bangalore, India, while A Squared will provide the creative direction for the projects, using its contacts in Hollywood. Financial terms for this and other deals were not disclosed.

Tata Elxsi's credits include its 3D animation services for Walt Disney's first Indian animation feature, 2008's *Roadside Romeo*, co-produced with veteran Bollywood banner Yash Raj Films. In addition, the company has worked on such Sony Pictures' films as *Spider-Man 3* and *Ghost Rider* with Nicolas Cage.

Tata Elxsi's CEO, Subramanian Ramadorai was recently in Cannes to participate in MIP and to attend Arnold Schwarzenegger's inaugural dinner for *The Governor*, the action-movie star and former California Governor's vehicle that was supposed to be his re-enter into show biz with an animated series produced by A Squared, but which was later cancelled due to Schwarzenegger's confessing to having fathered an illegitimate son.

*The Tata Group is said to be the largest private conglomerate in India with interests in communications, information technology (IT) and entertainment, among other areas. Of Tata's 90 operating companies, 27 are publicly listed.*

A product of New York City, where he lived in the '70s, and Los Angeles, where he earned a Masters in Computer Science at UCLA, up until recently the 67-year-old Indian-born Ramadorai was the chairman of Tata Consultancy Services (TCS). Today, Ramadorai is TEL chairman and also TCS vice chairman in addition to other chairmanships such as that of the Bombay Stock Exchange and Tata Technologies.

Last February Ramadorai was appointed advisor to India's Prime Minister with the rank of cabinet minister for the National Skill Development Council.

*VideoAge* first met with Ramadorai at MIP and he subsequently agreed to answer the following questions:

**VideoAge:** Are there sufficient animators in India? Reportedly there was a need for 10,000 animators.

**Subramanian Ramadorai:** The Indian animation industry is still at a nascent stage. The animation industry in India was formally recognized just over a decade ago. Lack of exposure, inadequate resources, investments and government support are some of the key challenges faced by the sector. Though it is witnessing a constant growth, it still requires nurturing and focused development.

As per the NASSCOM [animation association] report, the manpower requirement for animation and VFX industries in India is expected to grow from 17,500 in 2009 to 29,500 by 2012.

**VideoAge:** Costs of animation in India are estimated to be 40 percent lower than in Western countries, but is the quality comparable? In the past there were complaints about the low quality.

**S. Ramadorai:** The animation industry in India has gained significance as an outsourcing destination for animation work due to low cost skilled labor.



A Squared Entertainment's Andrew Berman, Tata Elxsi's chairman Subramanian Ramadorai; regional manager North America, Bhaskar Dutt

Some of the leading Indian animation studios have worked on international projects and delivered international quality. For instance *Roadside Romeo*, a full-length feature film that was co-produced by Disney Pictures and YRF, was fully animated in 3D by Tata Elxsi where we were responsible for both the creative and technical aspects of production. *Roadside Romeo* was nominated among the final set of five finalists for the "Best Animated Movie" by the VES awards alongside internationally acclaimed movies like *Wall-E* and *Kung Fu Panda*.

While the cost factor is a significant attraction for considering outsourcing of animation work, we need to ensure some key aspects to scale the quality to a level of consistency expected by the international market. The Indian industry has to assimilate high quality technology and tools, enable more international exposure for creative personnel and inculcate a knowledge sharing platform for international experts to come and share their learnings. The IT sector also faced similar challenges 20 years back. Today India is considered a preferred IT destination. The Indian animation sector needs to borrow some for the successful IT practices and also institute better project management skills to become more competent internationally.

Tata Elxsi for example, has deputed about 20 of its creative staff from the VCL studios in Mumbai to UCLA to get trained by international experts. VCL has an established studio in Los Angeles with highly acclaimed creative staff from Hollywood, and regularly arranges for key international talent to support projects. We also leverage our software teams to help develop and innovate more efficient workflows, specific tools and plug-ins for our work. At a national level, we have taken a key role in representing the industry with the government and the Ministry of Information and Broadcasting, and helped develop a national agenda that aims to foster and grow this industry in a sustained manner. This includes creating accredited animation courses, developing a comprehensive curriculum and enabling greater recognition for this

industry through national awards.

**VideoAge:** Is Tata's long-term strategy to focus on outsourcing or on being a producer?

**S. Ramadorai:** We believe that it is important for us to focus on a portfolio right from simple outsourcing to co-production and production. This is beneficial from a business and creative perspective as it provides a synergy and opportunity for concept incubation, design, styles, business trends, risk amortization and mitigation.

**VideoAge:** Is television Tata's main business or it is movies?

**S. Ramadorai:** Though we provide graphics/VFX for television commercials and VFX/CG for TV shows, our larger involvement has been in features (movies). Recently, Tata Elxsi signed a Memorandum of Understanding to form a joint venture with A Squared Entertainment, which envisions exciting properties. This tie-up intends to create, develop and distribute original brands, including animated entertainment and digital gaming. With this agreement we expect significant participation in the television segment too.

**VideoAge:** Since Tata operates in different sectors, will Elxsi be taking advantage of their services and financial support? Can you give us some examples?

**S. Ramadorai:** Tata Elxsi is a profitable, zero-debt company with access to funds both internally and externally if required. We do leverage other Tata companies where relevant. For example, we have utilized the computer infrastructure of CRL that hosts one of India's fastest supercomputers for rendering and animation projects.

We have executed some exciting projects for other Tata companies, including advertisements, new product launches and custom content, which are redefining how automotive and other B2C companies can use technology and animation more effectively to position and sell their products.

For example, we have developed stereoscopic 3D content to showcase the global truck being launched by Tata Motors.

(Continued on Page 22)

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# Indian Animation Biz Brings Money, Takes Investments

BY ERIN SOMERS

**O**utsourcing work to India has become such a common theme in the West that there was even a U.S. sitcom — the aptly titled *Outsourced*—about it on NBC TV network, although it was recently cancelled. In the entertainment sector, this trend is reflected in post-production work, special effects and in one genre of content above all others: animation.

In recent years, India has stepped forward as a major player in the animation exportation game. As of 2010, a reported 300 animation houses staffed by around 12,000 professionals have pushed India into the top echelon of the animation-for-hire game for films, TV series, commercials and computer games. Since 2006, the industry has grown 25 percent, and as there seems to be no end in sight, is poised to one day displace China, Korea and the Philippines as the top inexpensive animation hub.

At present, the animation business brings in the equivalent of more than U.S.\$650-\$700 million a year, and that figure is expected to grow to over a billion by 2013. Its strongholds are Mumbai (Bombay), Chennai, Bangalore, Hyderabad and Thiruvananthapuram, but animation houses can be found all over.

The main catalyst for the Indian animation boom was technological advancement. Computer animation platforms in Asia — like SGI, SoftImage and 3DMax to name a few — have become increasingly powerful, and the skilled workforce has increased, although not in sufficient number to meet demands. Entertainment juggernauts from all over the world including Imax, Walt Disney and Sony have taken note, and have begun outsourcing large amounts of content to the region.

Biren Ghose, head of Bangalore-based Technicolor India and chairman of NASSCOM Animation and Gaming Forum (National Association of Software and Services companies, a trade organization that caters to the Indian software industry), summed up the Indian animation business thus: “There are several animation studios in India, and the number that are purely animation studios would easily exceed 100, with many others using CG for visual effects in the live action sphere.”



Technicolor's Biren Ghose, chairman of Animation and Gaming Forum association

Formerly known as Paprikaas Interactive, Ghose's animation house has come 100 percent under parent company Technicolor's control in the past few years. Ghose pointed to DQ, Toonz Animation, Prana, Tata Elxsi and Crest, in addition to Technicolor, as the major companies dominating the field.

Indeed, Technicolor is a large operation — its new animation and gaming production facility staff is 1000 strong, and boasts the production of such high-profile projects as Nickelodeon's U.S. series *Kung Fu Panda* as well as much of the CGI work on series *Penguins of Madagascar*. Competitor Toonz, which many rank as the number one company of its type, is responsible for a number of big budgets, notably *The Adventures of Hanuman* for Cartoon Network Asia and feature film *The Adventures of Tenali Raman*, which was sold in Europe, Asia, North America and Singapore.

But big guys aside, there are also many smaller up-and-comers competing for a piece of the pie.

One such firm is DigiToonz, which specializes in Flash, 2D, 3D and motion-comic animation from its home base in Noida, about 12 miles outside of New Delhi. While DigiToonz has only a modest-by-comparison staff of 100 animators, CEO Vikas Kumar noted that, like most Indian animation houses, his company's biggest asset is its ability to deliver high quality product at a very low price. He stated, “DigiToonz leverages its Indian advantage of highly skilled talent and cost efficiencies. Our creative and production teams, client services, breadth of experience and technological savvy help

us in surpassing client expectations.”

For Kumar and company, keeping costs low is key. An animated feature film produced in the U.S. typically costs \$100 million to \$175 million, of which a large portion goes to paying high-profile voiceover talent. Still, celebrity voices aside, an estimated 80 percent of an animated film's cost goes to labor, putting the cost of actual production in the \$80-\$140 million range. Meanwhile, the cost of labor for an animated film made in India ranges from \$15 million to \$25 million — a fraction of the price.

The cost of labor breaks down to \$125 per hour for an animator in the U.S., as compared to \$25 per hour for an animator in India. Kumar noted, “There are very few companies working on Indian domestic content. We generally do overseas business.”

Plus, when it comes to producing animation for the west, India is not alone: Japan, Korea and China all have booming animation industries of their own. Technicolor's Ghose weighed in on the competition from other countries in Asia: “Japan has a cultural tradition for this art form and related arts. Korea paid its dues making content for others, but the big leap came when they could get support from the government and also sustain the publicity and coming out parties. China does not have a level playing field in that language and artists' welfare and treatment are subject to bare minimums and sometimes transgress the limits set.”

Kumar admitted that the three countries “are our competitors, especially China.” In the case of China, he shared Ghose's opinion that, “they always quote very low but their services are not up to the mark because they are a non-English speaking country.”

Despite the fact that most of its animation is commissioned by overseas producers, there is still a market, if a small one, for animation within India. Ghose estimated that, “Domestically produced content on air would be approximately 20 hours per annum at the maximum,” but pointed out that both volume and prices are getting better on a year-to-year basis. “We are just about scratching the surface when it comes to sales and business development,” he said of the domestic side. Meanwhile, Kumar pointed to several cartoon channels that air animated content in India, including Cartoon Network, Disney, Hungama, Pogo, Animax and Disney XD. ●

(Continued from Page 20)

Just a week ago, we enabled an innovative concept around an e-puppet, where a virtual car interacted with the audience and responded to questions, all with realistic lip synch and movements. This concept and the launch were a great hit, and also helped reflect the technological innovations that are built into these vehicles.

**VideoAge:** *Has animation in India created its own style (for example Japan's big eyes) or will it do whatever clients want?*

**S. Ramadorai:** Well, this continues to be a topic of discussion in several animation forums across India. At this point in time there is no specific Indian style of animation. India continues to develop content as per client's needs and requirements.

Animation styles are usually said to be derived from the culture, target audience and content/story. Since India brings a culture of over 5,000 years of history, Indians can lean on great tales of the stories of Ramayana and Mahabharata, to animal stories and parables around Buddha to develop its own discrete content and style. We believe that possibly the new ways of showcasing these stories to audiences not just in India but worldwide will help us connect to all types of people and enable us to define a distinct Indian style.

Currently Tata Elxsi is working on a feature film called *Arjuna* — a CG film for a Disney owned company, UTV. Based on the warrior prince from the Indian epic Mahabharata, Tata Elxsi has created a distinctive look with toon shaded (CG with a 2D look) characters contrasted against richly textured backgrounds — often matte painted. This kind of work might help India develop an ‘Indian style’ in the animation sphere!

**VideoAge:** *Executives in the international animation business complain that the TV animation business is shrinking, that competition is tough and that there is more supply than demand. What does this leave Tata?*

**S. Ramadorai:** This is an opportunity where Tata Elxsi can leverage its creative talent both in its Hollywood and India studios, and provide customers a unique benefit of lowered cost and international quality.

**VideoAge:** *Show business is different than engineering and it will bring Tata under more scrutiny simply because of more media coverage. Is Tata's corporate culture ready for some show?*

**S. Ramadorai:** Yes, we are! ●



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## 360 Degree TV Business

(Continued from Cover)

"In the past," recalled Sebastian Burkhardt, head of Sales and Marketing at Banijay International, "The pitch to a broadcaster would have been almost entirely about the show, and at the end of the presentation there would, typically, have been a few slides about possible brand extensions. Now extension of the brand is an integral part of the development process, as it is responsible not only for generating extra revenue streams, but also a great deal of 'buzz' around a show. And for broadcasters, this ability to generate extra revenue and buzz, as well as audience commitment, is probably now their top priority."

These are sentiments shared by Gary Carter, chief operating officer of FremantleMedia, and chief creative officer of FMX, who was clear that, "if this kind of engagement isn't important to broadcasters — then it should be." Underlining the importance of 360 degree exploitation, Carter noted, "Increasingly, the market expects formats to touch audiences across the full range of platforms on which the audience is present, enabling them to do what they have always done with our content, which is to engage, not with it, but through it to their own community, whether that be family, friends or fellow fans."

All of which is, doubtless, both true and important, but nonetheless, these observations mask a seismic shift in the nature of the content business. Producers increasingly see themselves as generating ideas, from which they can produce content for any platform, not necessarily television, and they see the important challenge as generating extensions of the idea from the medium in which it was



FremantleMedia's Gary Carter



Money Drop producer David Flynn

born to others.

David Flynn, managing director of Remarkable Television, and producer of Endemol's *Money Drop*, explained, "Our creative team thinks about lots of different media, consequently, some of the ideas we work on are purely digital ideas and some are purely television ideas, and we would never walk away from a great television idea just because it had limited ability to be extended into other areas, just as we would never walk away from a great digital idea just because it wasn't easy to see how it could be developed for television."

Fremantle's Carter concurred, stating unequivocally, "Not all ideas can do everything. We are in search of ideas on their own terms and so if an idea came up that was brilliant, but limited to on screen exploitation, we would not turn it down. Just as, increasingly, Fremantle diversifies into adjacent business areas such as gaming, brand funded programming and live events, we would not turn down a brilliant idea in one of these areas just because it was unsuitable for television."

Banijay's Burkhardt stated that this is a precursor of things to come. "In the future," he suggested, "we will see loose partnerships developing between companies in all sorts of different areas such as advertising, event management, promotion, IT etc. to develop new ideas even when there isn't a specific project for them to work on." Key to this is Burkhardt's view that, "a great idea is a great idea and no one would walk away from that. What makes a great idea is its ability to connect with an audience,

and, if it does that, then it should be possible to design brand extensions. If that isn't possible then I would think that the idea probably doesn't have that sort of connection with its audience and probably isn't such a great idea after all."

Head of Formats and International Relations at Sweden's TV4, Cathrine Wiernik did not dispute the growing importance of brand extension, and acknowledged that, "TV4 is a very forward looking company, and we consider the exploitation of rights in every field, especially the Internet. These elements are getting more and more important, and it is true that we see ourselves more and more as a media house rather than just a broadcaster. That said, it is important to remember that TV is still the 'mother ship.' In the case of *Idol* and *Big Brother*, for example, the online communities are almost as big as the TV show, but my point is,



Banijay International's Sebastian Burkhardt

*Producers increasingly see themselves as generating ideas, from which they can produce content for any platform, not necessarily television, and they see the important challenge as generating extensions of the idea from the medium in which it was born to others.*

had it not been for the TV show, these communities would not have existed."

In contrast, Banijay's Burkhardt pointed to their new format *Faces*, launched at April's MIP market in Cannes. "This is an idea that was initially designed as an app for Facebook in which people were asked to pair up faces and match them with their connection, so, for example, we might have pictures of two members of the Rolling Stones and ask they be matched with the band's logo. This worked really well on Facebook, and so we decided to develop it as a television property."

This willingness to think "360" about a show's development is also having an impact on the nature of the shows being offered to broadcasters. David Flynn, for example, was clear that, "*Money Drop* could have been done as a traditional game show, pre-recorded in front of a studio audience, but the 360 extension, especially the fact that the show is live and the audience can play along on their computer screens in real time, made it a totally different show that appeals to a much younger demo — one that does not normally watch traditional game shows. But, at heart, it is still a traditional game show."

"Ultimately," suggested Banijay's Burkhardt, "what we are talking about is understanding the DNA of a great idea and then transplanting it into other medium, and this will mean that all of us in the business, whether producers, distributors, channels or platforms, will all have to develop our business away from our core activity and become much broader businesses of a more general nature." ●





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## DISCOP Markets

(Continued from Cover)

But the main questions still are: Is DISCOP cost efficient? Are these markets effective? And, what can a company do differently at DISCOP than at other larger, more encompassing markets?

Considering that DISCOP Africa serves 47 territories out of 52 countries that form the continent, the market is certainly cost efficient if one compares an investment of U.S.\$6,400 for a basic stand, travel and accommodation (less for just a viewing box), versus an estimated \$21,400 for a 15-day tour to visit the key 12 countries: Ghana, Nigeria, Kenya, Senegal, South Africa, Sierra Leone, Uganda, Ethiopia, Congo, Angola, Cameroon and Burkina Faso. This is considering that, as a general rule of thumb for key Sub-Saharan markets, program prices would be in the range of \$250-\$350 per hour.

Similarly, in a region as large as Eastern Europe with some 22 countries, most of which pay as little as \$100 per hour, markets such as DISCOP East become very valuable in terms of cost efficiency. Where cost effectiveness is concerned, some distributors are complaining that full-fledged participation at DISCOP East is becoming expensive, however the organizers offer many lower-cost opportunities.

Dutch producer/distributor FCCE is one company that attends all markets and Sales director Alan Green, who also attends all believes, "the DISCOP markets are a very efficient and cost effective way of reaching the emerging markets in Africa and the Middle East." Although he would, "like to see the timing of the markets spread more evenly away from major markets such as MIP and MIPCOM."

Power's vice president International Sales, Eric Muller in London, is another who attends all DISCOP markets. He acknowledged that, "the DISCOP markets are important and are very much a part of our business plans, as they enable us to meet clients we would otherwise find it difficult to meet." But he is also concerned that, "Basic Lead (the DISCOP organizers) are spreading their



Deutsche Welle's Petra Schneider

resources too thinly," and "the service at the last DISCOP Africa suffered as a result."

Since its inception in 2009, DISCOP Africa has been held twice annually, and Muller is one of many who believes that Sub-Saharan Africa cannot support two markets. There are strong indications that next year DISCOP Africa will be just one event in Nairobi in September. While it is true that these rumors have been around for a while, it is also true that no event is shown on the DISCOP website for next February.

Germany's Deutsche Welle is another company present at all DISCOP events, although director of Distribution, Petra Schneider sends different sales managers to each of the events, and, she said Deutsche Welle finds the DISCOP markets, "a very efficient way to meet with smaller regional buyers," and further, "the events also offer real insight into regional media landscapes." Indeed, describing the inaugural DISCOP Istanbul as, "very well organized, and showing a lot of potential in the Arab broadcast market,"

*Considering that DISCOP Africa serves 47 territories out of 52 countries that form the continent, the market is certainly cost efficient if one compares an investment of U.S.\$6,400 for a basic stand, travel and accommodation.*



she admitted that, "the real allure was the introduction DISCOP Istanbul provided to the Turkish broadcast market, which is very dynamic, very important, and a market we want to expand into in the near future." Another expansion Schneider would like to see is the creation of a DISCOP market for Latin America, since, as she explained, "the region offers a range of interesting markets, but no central conference to meet with buyers."

Al Jazeera is an example of a company only attending one DISCOP market, although, interestingly, that market is DISCOP Africa, which Al Jazeera has attended since its launch in 2009 and not, as might be supposed, DISCOP Istanbul. Head of Distribution, Al Jazeera Networks, Martin Ryan enthused, "DISCOP Africa is the number one market for the TV content business in Sub-Saharan Africa, and the sales centric nature of these events facilitates a fantastic opportunity for Al Jazeera to do business with a large number of the regional operators and channels." Like Deutsche Welle's Schneider, Ryan also appreciated, "the great platform DISCOP Africa provides to learn about market conditions, and, more importantly, to network with key decision makers in this diverse and rapidly changing media landscape."

Nordic World's COO and Sales director, Jan Salling, also only attends one DISCOP market, in his case it is DISCOP Budapest, although it must be remembered that Nordic World is less than a year old, and Salling said that the company, "is considering attending DISCOP Istanbul." In answer to the question "are there too many DISCOP markets?" Salling was very direct, "as long as the markets keep attracting enough buyers and sellers, they are relevant for us to attend." He is another who also appreciates the time the smaller DISCOP markets allow him and his sales team to spend with the regional buyers. Complaining that, "the MIP and MIPCOM markets never allow time for anything other than hectic 30-minute back to back meetings," Salling noted that, "at DISCOP we have time to get a proper update on client needs, changes in structure and new market conditions,



all of which are very important, not least because it stops you from wasting your time, and that of your clients pitching irrelevant products." Given the nature of Nordic World's business, this extra time with clients is also important because, as Salling explained, "selling formats will always be a matter of trust and so getting to know your clients well on a personal level is crucial, and DISCOP allows you the time to do this."

British producer/distributor Cineflix is another that only attends DISCOP Budapest, and newly appointed Sales manager, German Speaking Europe, CIS Territories and North East Europe, Caroline Schroeter, will be attending for the first time, although the company has exhibited in Budapest for many years. Schroeter insisted, "The importance we attach to DISCOP Budapest is evident from the fact that this year we will be taking a suite and sending two sales managers." She went on to emphasize this, pointing out, "There are great business opportunities in the region, especially in terms of selling TV formats. We have had a lot of interest; for example, in *Eat Yourself Sexy* and our new hit shows, *In-Law Wedding Wars* and *My Dream Home*. I have recently noticed a huge production boom in the region, which is an opportunity for Cineflix International and our expanding format business." ●



Zed's Dany Ithaxoum, TV France Int'l's Mathieu Bejot



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# Conferences & Events News

## AIRLINES' FUEL SURCHARGE GAMES

In view of the fact that costs of airline tickets for this summer have almost doubled, we received an e-mail from an industry insider who wants to remain anonymous.

"Actually, the costs of tickets have gone up little. Unfortunately, it is the fuel surcharge that last year was \$280 and is now \$420 that caused the increase. However, to me it's a fraud, because if an Airbus 330 is 80 percent full, the fuel surcharge generates \$112,560 while the actual fuel cost is only \$70,000.

In my view, the fuel surcharge is another way to monetize the oil crisis and blame others. I bet that if tomorrow a barrel of oil were to go down to \$80 it would take months before the fuel surcharge would go back to \$280."

He then added, "The travel business is not the same anymore, nor will it ever be the same again. The present business model is about to crumble since most of the players are from the old school and are rejecting the fact that the new order is taking place."

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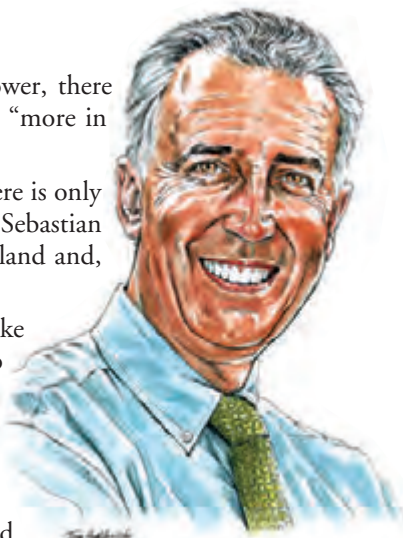


**A** social critic wrote recently that, in terms of media moguls with political power, there should be more Rupert Murdochs in the world. The hope is that he meant, “more in each country.”

The world has a good number of Murdochs, but alas, in some countries there is only one: Silvio Berlusconi in Italy, the real Rupert Murdoch in the U.S. and U.K., Sebastian Piñera in Chile, Arnaud Lagardere in France, Shondhi Limthongkul in Thailand and, perhaps, Jimmy Lai in China, just to mention a few.

Somewhat better off are those countries that have at least two competing Murdochs, like Mexico: Emilio Azcarraga Jean and Ricardo Salinas. In Colombia: Julio Mario Santo Domingo and Carlos Ardila Lülle; India with Subhash Chandra and Ratan Tata. There are also countries where media moguls with political power have ended up in jail and others where they are tolerated because they're not in politics, like the case of Gustavo Cisneros in Venezuela.

*VideoAge's* extensive media library houses many books that deal with media moguls, and two in particular, *The Curse of the Mogul* and *Autumn of the Moguls*, but none of the books deal specifically with moguls in politics. Plus, researching the subject on the Internet, I came across an article declaring that “Old-media moguls don't matter anymore.” The article listed among the media moguls with the “ability to influence politics [in the U.S.] and abroad through media properties” Rupert Murdoch as number nine, Silvio Berlusconi and New York City Mayor Michael Bloomberg (as number 17), but also Sony's Howard Stringer (number 55) and Oprah Winfrey (number 65). According to the article, the fact that Walt Disney's Bob Iger, at number 97, as the CEO of the world's largest media company “barely breaks into the top 100, speaks more to the impotence than power of old media.” Frankly, I don't remember Iger, Stringer or Winfrey influencing any self-serving decision by the U.S. communications authorities.



What separates a media mogul who is only interested in making money for the company from the Murdochs of this world is a mix of media power and political influence. However, the latter combination is highly dangerous and should not be allowed. But, it is the price that democracies, especially the weaker ones, have to pay.

To stunt the growth of the Murdochs in the world in the first place and to limit their political power could be undemocratic. Naturally, the Murdochs of this world are aware of democracy's structural loopholes and weaknesses, and they know how to leverage them in order to increase their power and, in doing so, limit the democratic process that allowed them to succeed in the first place.

In other words, they take advantage of democratic rules, and then they scheme to reduce those rules in order to increase their control and power. A variation of this strategy is for media moguls to cavort with or help undemocratic rulers in order to increase their power or simply to keep the company alive.

If the Murdochs of this world want to succeed,

they have to win over political powers. Some do it only with the goal of making more money, others with the task of making a political statement or both. Some, like Berlusconi, are forced to enter politics in self defense and then, in order to prosper, have to abuse their political power.

The Murdochs, however, can only prosper in weaker or weakened democracies where capitalism can be turned into anarchy.

The arsenal of weapons that the Murdochs have at their disposal to achieve their goal is vast: Media outlets, legal firepower, political patronage, financial strength, academic sponsorship and visibility for luminaries, which for many in academia is more important than money.

But in all cases, the process says less about these Murdochs and more about the structural weaknesses of the countries in which they operate. A strong democracy should have sufficiently robust rules, plus well-developed checks and balances to prevent monopolies, oligopolies and oligarchies that also foster the development of many competing Murdochs.

Indeed, countries that will prosper are those that are able to create many Murdochs. Past examples demonstrate that many of the world's Murdochs were created throughout history and, when they confronted each other on an even playing field great things came about. But, above and ever vigilant over the Murdochs there were politicians with a great sense of democratic institutions.

Dom Serafini



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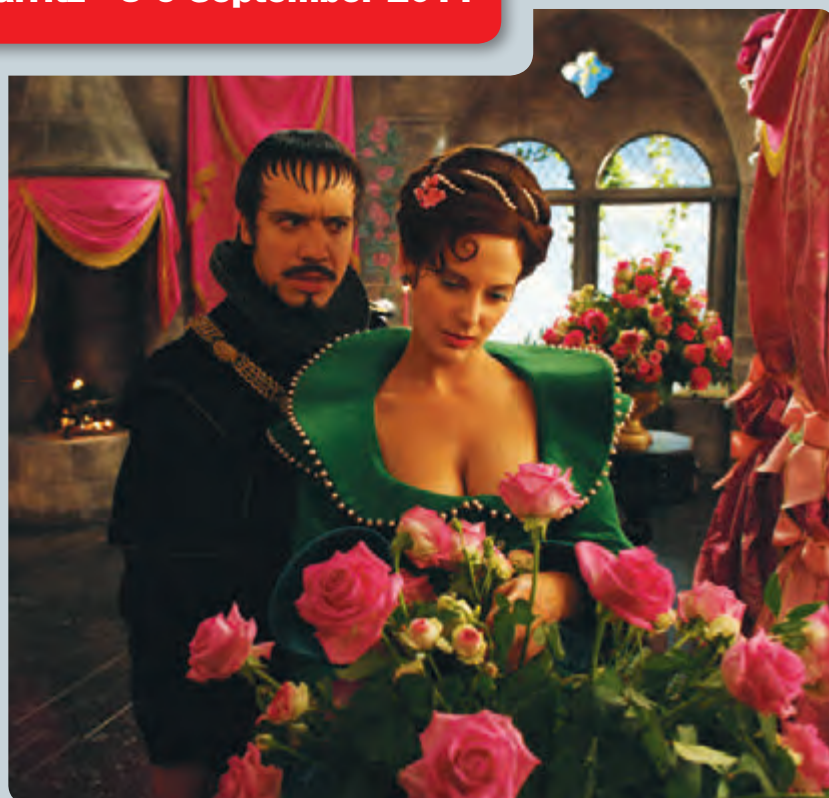
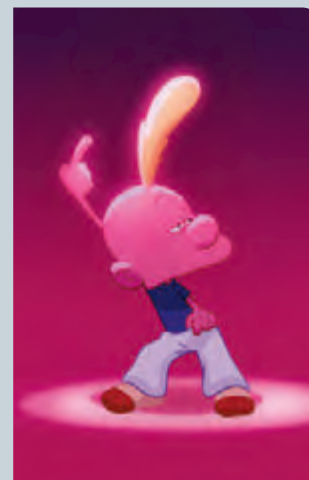
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